

NCPDP Online

User Guide

3rd Party Contracting/PSAOs

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User Guide Update Log

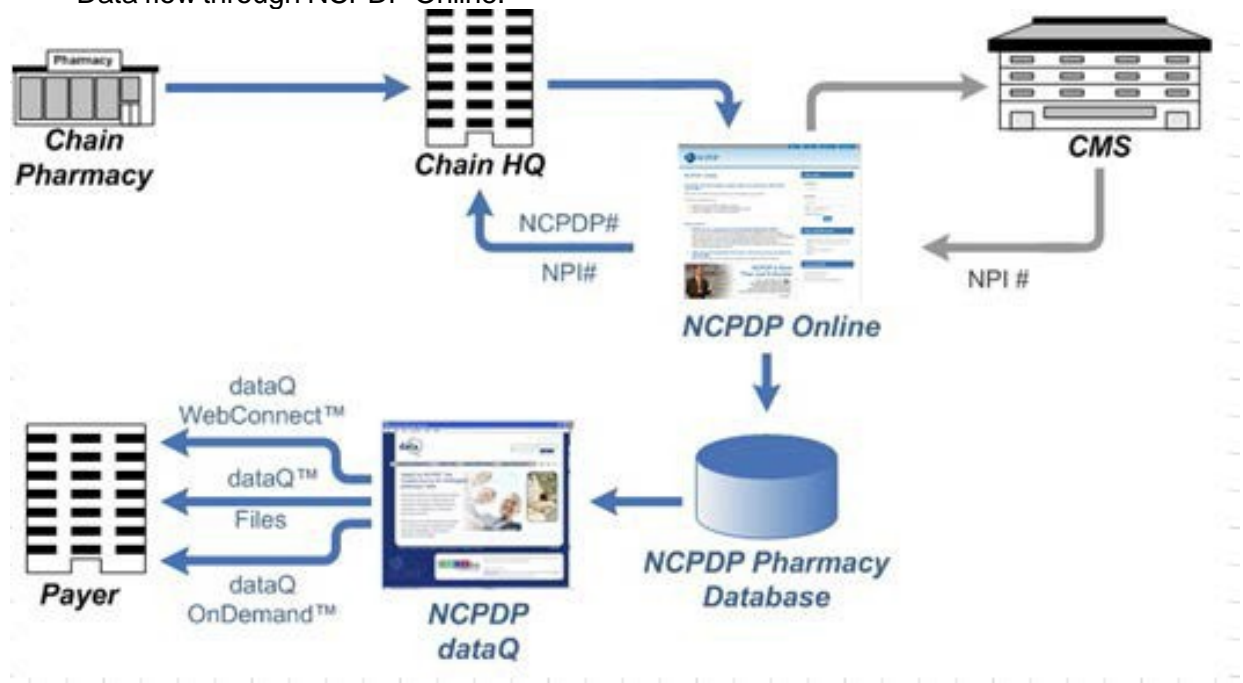
- February 7, 2009 ☒ Change of Relationship/Payment Center (see 4.2)
- October 20, 2015 ☒ Updated for Website redesign
- August 2, 2016 ☒ Credentialing and CMS 455 (see 4.1)
- February 06, 2018 ☒ General and Professional Liability (see 4.1)
- March 20, 2018 ☒ Logo update
- August 23, 2019 ☒ Remove Authorized Official form and EFIO references - Discontinued

1.0 Introduction

NCPDP has maintained accurate pharmacy information for over 30 years. It is important that pharmacies update their information with NCPDP. Doing so is vital to proper reimbursement by many third-party plans. CMS also uses NCPDP pharmacy information to audit Medicare Part D claims data. With the launch of **NCPDP Online** (accessonline.ncdp.org) it is now easier than ever to help maintain pharmacy data for the pharmacies your organization represents.

You can now access pharmacy data in real time for the pharmacies where you are the primary relationship or where you have been given permission to access/edit their pharmacy profiles. NCPDP ensures accuracy of pharmacy data through both automated and manual data validation.

Data flow through NCPDP Online:



2.0 Log In

As soon as you receive your user name and password you should log in, verify your data is correct and clean up any outdated information. Anytime your pharmacy information changes in the future, you should return to NCPDP Online to make updates.

Initially only the Authorized Official for your pharmacy will have an account and he/she will be set up as an Administrator. If you are not your pharmacy's Authorized Official and you do not have an account on NCPDP Online, and you need one, you should contact your Authorized Official to get an account.

The NCPDP Online web site supports multiple browsers such as Google Chrome, Apple Safari, Mozilla Fire Fox and Microsoft Windows Explorer 9.0 or higher.

There are parts of NCPDP Online that require your Internet browser to accept pop-ups. You should allow pop-ups for accessonline.ncdp.org, which you can do without allowing pop-ups for other web sites.

The following is a guide to allowing pop-ups for accessonline.ncdp.org without allowing pop-ups for other web sites.

Microsoft Internet Explorer:

1. Click on "Tools" at the top of your Microsoft Internet Explorer browser
2. Select "Pop-Up Blocker"
3. Select "Pop-Up Blocker Settings"
4. Enter accessonline.ncdp.org in the "Address of Website to Allow" box
5. Click the "Add" button, then click the "Close" button

Google Chrome:

1. In the top-right corner of Chrome, click the Chrome menu ☰.
2. Select **Settings**, scroll to the bottom and click on **Advanced Settings**
3. Click **Show advanced settings**.
4. Under "Privacy," click the **Content settings** button.
5. Under "Pop-ups," click **Manage exceptions**.
6. Enter accessonline.ncdp.org in the "Hostname Pattern" box.
7. Select Allow in the Behavior column.

Safari:

Safari does not allow single web site control over blocking pop-ups windows. Pop-ups are either blocked, or they are not. To allow pop-ups:

1. From the Safari menu, check to see if the Block Pop-Up Windows option is checked. Un-checking this option will allow pop-ups.
2. To block pop-ups once again, check Block Pop-Up Windows in the Safari menu. You can use a keyboard shortcut: [Apple key]-K.

Or you can use this work around:

Command-Shift-K keys can toggle blocking pop-ups on and off as you visit different Sites.

Firefox:

If your preferred browser is Firefox, open Firefox and do the following:

1. In the top-right corner, click the menu ☰, click on options
2. On the left, select the Content tab
3. Click the Exceptions button next to the Block Pop-up Windows item
4. Enter accessonline.ncdpd.org in the Address of web site box.
5. Click Allow. The site will show up in the list.
6. Select save changes to finish.

To log in to NCPDP Online:

1. Open your Internet browser and go to
accessonline.ncdpd.org
2. Enter your **User Name** and **Password**, then click the Login button.

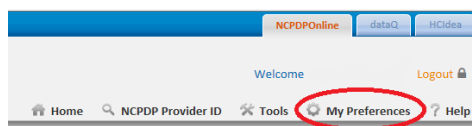
If you click the **Remember Me** box, you will automatically be logged in if you are using the same computer the next time you visit the website (*if your Internet Browser is set to allow “cookies”*). When you are finished using NCPDP Online, you should simply close your browser or go to another site, do not “log out”.



The screenshot shows the 'User Login' section of the NCPDP Online website. It features a blue header with the text 'User Login'. Below this, there are two input fields: 'Username' with a placeholder 'User Name' and 'Password' with a placeholder 'Password'. A checkbox labeled 'Remember me' is positioned below the password field. A link 'Forgot Password?' is located below the checkbox. A blue 'Login' button is at the bottom right of the login section. Below the login section is a blue header with the text 'New to NCPDP Online'. Underneath this header is a link 'Help Resources - Get FAQ's, guides and reference' with a small blue arrow icon to its left.

3.0 Managing Your Preferences

The first thing you should do after logging on to NCPDP Online is update **Your Preferences**. This includes updating your user profile, changing your password and PIN, and setting alert preferences.



3.1 Change Your Profile

Your profile contains your basic contact information.

1. Click the **My Preferences** tab.
2. Make changes to your **Primary Information**. Your email address, phone number and fax number will be validated for correct format.
3. Click the **Update** link to save your profile.

3.2 Change Your Password

To change your password, you will need your current password.

1. Click the **My Preferences** tab.
2. Click the **Change Password** link in the **Actions** box.
3. Enter your Current Password, a New Password and re-enter the new password in the Confirm New Password box.
4. Click the **Update** link to save your new password.

3.3 Change Your PIN

Along with a user name and password, you are also provided with a PIN. The PIN is an additional level of security on the web site. Your PIN will be required when submitting a new NCPDP Provider ID application or updating key information in an existing NCPDP Provider ID pharmacy profile.

Updates to the following fields within an existing NCPDP Provider ID pharmacy profile will require a PIN for authentication:

- Pharmacy DBA Name
- Pharmacy Legal Name
- Store Closing Date
- Federal Tax ID and Documentation
- Relationships and Payment Centers

To change your PIN, you will need your current PIN.

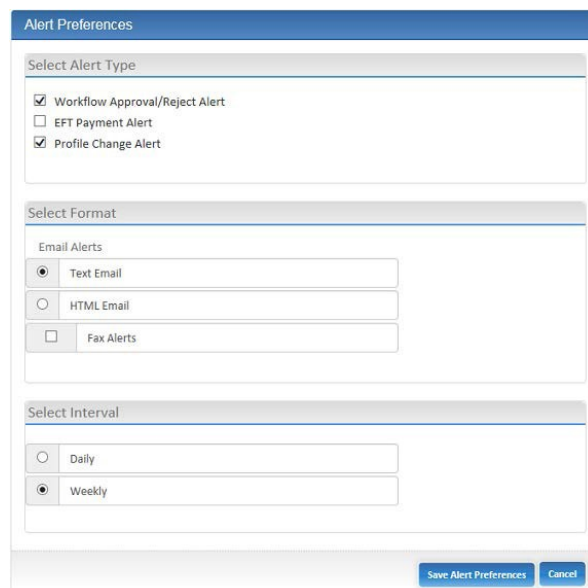
1. Click the **My Preferences** tab.
2. Click the **Change PIN** link in the **Actions** box.
3. Enter your **Current PIN**, a **New PIN** and re-enter the new PIN in the **Confirm New PIN** box.
4. Click the **Update** link to save your new PIN.

3.4 Change Your Alert Preferences

Your Alert Preferences define how you want NCPDP Online to alert you when changes are made to your pharmacy data.

1. Click the **My Preferences** tab.
2. Click the **Alert Preferences** link in the **Actions** box.
3. Select one or more types of alerts from the **Select Alert Type** list.

4. Click one or more alert formats from the **Select Format** list. If you select **Fax Alerts**, enter your preferred fax number. If you do not enter a preferred fax number, the fax number in your profile (see 3.1 *Change Your Profile*) will be used. *Note: Some email accounts do not allow HTML email; if you experience issues receiving an HTML email alert, change the alert to Text email.*



The screenshot shows the 'Alert Preferences' form with the following sections:

- Select Alert Type:** Contains three checkboxes: 'Workflow Approval/Reject Alert' (checked), 'EFT Payment Alert' (unchecked), and 'Profile Change Alert' (checked).
- Select Format:** Contains three radio buttons: 'Text Email' (selected), 'HTML Email' (unchecked), and 'Fax Alerts' (unchecked).
- Select Interval:** Contains two radio buttons: 'Daily' (unchecked) and 'Weekly' (selected).

At the bottom right, there are two buttons: 'Save Alert Preferences' and 'Cancel'.

5. Choose to receive your alerts **Daily** or **Weekly**. If you choose daily, all changes to your pharmacy data will be compiled and one alert will

be sent at approximately 1:00am Eastern for the changes made the day before. If you choose weekly, all changes to your pharmacy data will be compiled, over the course of a week, and one alert will be sent at approximately 1:00am Eastern on Thursdays for the changes made the week before.

Note: If there are no changes to your pharmacy data, you will not receive an alert.

There are some alerts that you will receive in real time. These are time sensitive alerts that require your attention immediately.

6. Click the **Update** link to save your alert preferences.

3.5 PIN Recovery

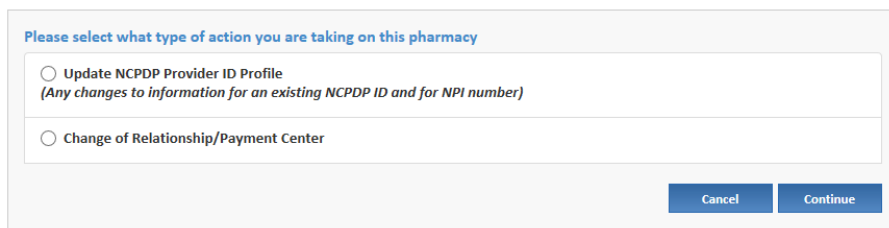
If you have forgotten your PIN, you can request to have it reset and emailed to your e-mail address on record.

1. Click the **My Preferences** tab.
2. Click **PIN Recovery** link in the **Actions** box.
3. You will be asked **Do you wish to reset your PIN and send it to your e-mail address on record?** If you click **OK**, your PIN will be reset and emailed to you.

4.0 Update an Existing NCPDP Provider ID Pharmacy Profile

When you update an existing NCPDP Provider ID pharmacy profile, you will have two options:

- Update NCPDP Provider ID Profile
- Change of Relationship/Payment Center



Please select what type of action you are taking on this pharmacy

☐ Update NCPDP Provider ID Profile
(Any changes to information for an existing NCPDP ID and for NPI number)

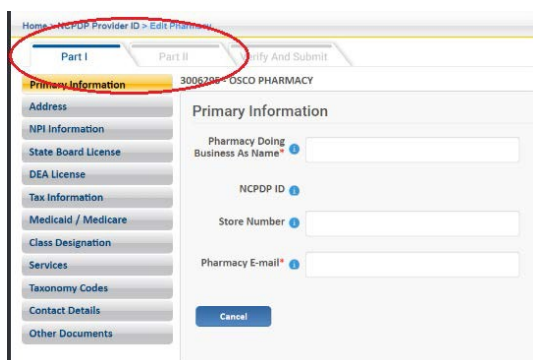
☐ Change of Relationship/Payment Center

Cancel Continue

4.1 Update an NCPDP Provider ID Profile

To update an NCPDP Provider ID pharmacy profile:

1. Click the **NCPDP Provider ID** tab.
2. All pharmacies managed by your organization are listed. To search for a pharmacy, enter the NCPDP number and click the **Search** button OR click the **Advanced Search** link, enter search criteria and click the **Search** button. From the search results, click the **Edit** icon (looks like a pencil) for the pharmacy you wish to update.
3. Choose **Update NCPDP Provider ID Profile** and click the **OK** button. When you update your NCPDP Provider ID pharmacy profile, it is separated into 2 tabs (Part I & Part II).



Under Part 1 the following sections which can be accessed by clicking the appropriate tab on the left of the page:

- Primary Information
- Address (Physical Location and Mailing Address)
- NPI Information
- State Board License
- DEA License
- Tax Information
- Medicaid/Medicare
- Class Designation
- Services
- Taxonomy Codes
- Contact Details (Authorized Official and Profile Manager)

Under Part II the following sections can be accessed by clicking the appropriate tab on the left of the page (Note: Part II does not apply to Non-Pharmacy Dispensing Sites (NPDS) and will not be shown):

- Additional Pharmacy Detail
- Ownership & Control
- Owner & Control Entities
- Owner Relationship Detail
- Other Pharmacies Owned
- Insurance
- Pharmacist-in-Charge
- Pharmacy Licenses/Certifications/Accreditations
- Sanctions Exclusions Actions
- Practice Settings
- Immunizations
- Clinical Services
- Compounding

Some parts of the profile will require a document upload.
Documents required for the NCPDP Provider ID pharmacy profile under Part I include:

- State pharmacy license
- DEA license
- Federal Tax ID (EIN) document
- NPI confirmation

Documents required for the NCPDP Provider ID pharmacy profile under Part II include:

- Federal Tax ID (EIN) documentation for any company that owns or has part ownership in the pharmacy
- Copy of the pharmacy's General and Professional Liability Insurance document(s)
- Pharmacist(s) State Board license(s)
- Pharmacist in Charge (PIC) State board License

Additional documents in Part II that may be required if applicable to the pharmacy include:

- Copy of Inspection Report if pharmacy has any disciplinary action recoded by state board of pharmacy in past 10 years
- Copy of most recent site visit by the State Board of Pharmacy
- Supporting document to contest a mistaken sanction
- Federal Anti-Kickback Statute Compliance Policy & Procedures document.
- Any Pharmacy Accreditation document(s)
- Immunization certification, if pharmacy provides vaccinations and/or immunizations.
- Pharmacist in Charge (PIC) - NPI Confirmation Letter

- Pharmacist In Charge (PIC) - Controlled substance License

Required only if the pharmacy does sterile compounding or complex non-sterile compounding:

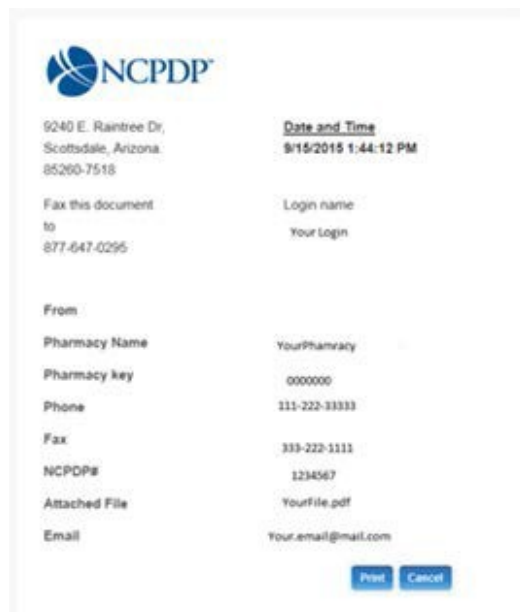
- Compounding Accreditation Certificate
- Compound Marketing Material
- Sales force listing of contractors (1099) or employees
- If pharmacy has preprinted prescriptions, then Copy of Pre-printed Prescriptions
- If have process to check for allergies, then copy of the Policy & Procedures
- If provide samples or medications to Physician or prescriber offices, then copy of Policy and Procedures
- Policy and Procedures for USP 795 compliance if have them
- Policy and Procedures for USP 797 compliance if have them
- Standard Operating Procedures (SOP) for compounding a gel, cream or ointment if you have them
- Policy and Procedure if pharmacy provides compounds to be dispensed or sold to other parties
- If pharmacy has MSDS sheets and is accessing them then Policy and Procedures for that
- Policy and Procedure for submitting Usual and Customary (U & C) price, if pharmacy does so
- If pharmacy engaged in anticipatory compounding, then Policy and Procedures

If you have the document electronically, simply upload it in the appropriate section of your pharmacy profile by clicking the **Select Files or Choose Files** button and selecting the file from your computer.

If you do not have the document electronically, click the associated **Click Here** link.

A fax coversheet will be presented for you to print. Print the coversheet and fax it with the document to the toll-free number indicated on the cover sheet. Your document will be converted to an electronic file (Adobe pdf file) and associated with your pharmacy profile.

It is important you use the coversheet generated when you fax. It contains important information for NCPDP to properly match the document with your profile. If you have more than one document to send to NCPDP, you may batch all documents under one coversheet.



The form is titled "NCPDP" and contains the following fields:

9240 E. Raintree Dr. Scottsdale, Arizona 85260-7518		Date and Time 9/15/2015 1:44:12 PM
Fax this document to 877-647-0295	Login name Your Login	
From Pharmacy Name YourPharmacy	Pharmacy key 000000	
Phone 111-222-3333	Fax 333-222-1111	
NCPDP# 1234567	Attached File YourFile.pdf	
Email Your.email@mail.com		

Buttons: Print, Cancel

4. If you are updating your pharmacy profile and you are not ready to submit changes to NCPDP, you can save your changes by clicking the **Pend Changes** link in the **Actions** box and/or at the bottom of the profile page. You can access your pended changes by going to the **NCPDP Provider ID** tab and then clicking on the **My Pended Pharmacies** link in the **Queue** box.
5. When you have completed your changes and you are ready to submit them to NCPDP, click the **Submit to NCPDP** link in the **Actions** box or at the bottom of the profile page. Depending on the data you changed, you may be required to enter your PIN. Changes to the following data require a PIN to submit to NCPDP: Pharmacy DBA Name, Pharmacy Legal Name, Store Open / Close Date, Physical Address, NPI Number and confirmation document, Federal Tax ID and documentation, State Tax ID, Class Designation, Taxonomy Code(s), and Authorized Official.

When submitting a change to the NCPDP Provider ID pharmacy profile, the following fields will be validated:

- Date fields are valid dates
- Expiration dates in future

- Combination of class designation and dispenser type/taxonomy codes are correct
- NPI number is valid
- DEA registration number is valid

The following fields will be checked against other NCPDP Provider ID pharmacy profiles for duplicates*:

- Pharmacy license number
- Pharmacy DEA license number
- Pharmacy NPI number

**Note: NCPDP Online will allow some duplicates and not others. You will be prompted with more information and advised on how to proceed when a duplicate is found.*

Your changes will be submitted to NCPDP for verification AFTER the pharmacy's Authorized Official approves changes. Once NCPDP verifies the changes to the NCPDP Provider ID pharmacy profile, you will be alerted based on your alert preferences (see 3.4 *Change Your Alert Preferences*). If the changes are verified, but rejected by NCPDP, you will receive an alert with the reason for the rejection. You can then make the appropriate changes and re-submit.

4.2 Change of Relationship/Payment Center/Remit and Reconciliation

You can add, update or deactivate a relationship, payment center or remit and reconciliation code associated with an NCPDP profile.

1. Click the **NCPDP Provider ID** tab.
2. Click the **Update** link for the pharmacy you wish to change a relationship or payment center.
3. Choose **Change of Relationship/Payment Center/Remit** and click the **OK** button.

A list of the active relationships and payment centers are provided. You can **Add Relationship**, **Add Payment Center**, **Add Remit and Reconciliation Code**, **Update**, or **Deactivate** a relationship/payment center/ remit code. In

all cases, you will be required to enter your PIN for authentication before changes will be submitted to NCPDP for verification. Once NCPDP verifies, you will be alerted based on your alert preferences (see 3.4 *Change Your Alert Preferences*). If your changes are verified, but rejected by NCPDP, you will receive an alert with the reason for the rejection. You can then make the appropriate changes and re-submit.

To add a relationship:

1. Click the **Add Relationship** button to add a relationship.
2. Choose the relationship type from the **Select Relationship Type** list. The screen is refreshed and a list of relationships, based on relationship type, is presented. Choose a relationship from the **Select Relationship** list. *(Note: If you do not see any choices appear in the drop down, that means that your NCPDP User Account is not linked to any relationships of the type you chose to add.)*

If adding a payment center with this relationship, click the **Add** button and choose a payment center from the **Select Payment Center** list. The payment center will be “linked” to the relationship, which means they will both have the same effective date and will be updated or deactivated together in the future. *(Note: If you do not see any choices appear in the drop down, that means that your NCPDP User Account is not linked to any payment center codes.)*

If adding a remit and reconciliation code with this relationship, click the **Add** button and choose a remit and reconciliation from the **Select Remit and Reconciliation** list. The remit and reconciliation code will be “linked” to the relationship, which means they will both have the same effective date and will be updated or deactivated together in the future. *(Note: If you do not see any choices appear in the drop down, that means that your NCPDP User Account is not linked to any remit and reconciliation codes.)*

To avoid any remittance delay, please be sure to deactivate any old payment centers when you add a new one to insure the payments are delivered to the proper location.

3. Enter the effective date of the relationship in the **Select Relationship ID Effective Date** box.

4. If you have an electronic copy of the affiliation agreement, click the **Browse** button and select the file from your computer. If you have a paper copy of the affiliation agreement, click the **click here** link to print a fax coversheet and fax the affiliation agreement to the toll-free number provided. The agreement will be converted to an electronic file (Adobe pdf) and attached to the pharmacy profile.
5. If this is the primary relationship, click the check box for **Is Primary**. You are allowed to identify one relationship as the primary relationship. A stand-alone payment center and /or Remit and reconciliation entity cannot be designated a Primary relationship.
6. Click the **Submit** button to submit to the pharmacy for verification.

To add a stand-alone payment center:

1. Click the **Add Payment Center** button to add a payment separate from a specific relationship (e.g. not "linked to a relationship).
2. Choose a payment center from the **Select Payment Center** list. *(Note: if you do not see any choices appear in the drop down, that means that your NCPDP User Account is not linked to any payment center codes.)* To avoid any remittance delay, please be sure to deactivate any old payment centers when you add a new one to insure the payments are delivered to the proper location.
3. Enter the effective date of the payment center in the **Select Relationship ID Effective Date** box.
4. If you have an electronic copy of the affiliation agreement, click the **Browse** button and select the file from your computer. If you have a print copy of the affiliation agreement, click the **click here** link to print a fax coversheet and fax the affiliation agreement to the toll-free number provided. The agreement will be converted to an electronic file (Adobe pdf) and attached to the pharmacy profile.
5. Click the **Submit** button to submit to pharmacy for verification.

To add a stand-alone remit and reconciliation

1. Click the **Add Remit and Reconciliation** button to add a reconciliation code separate from a specific relationship (e.g. not “linked to a relationship”).
2. Choose a reconciliation code from the **Select Reconciliation** list. *(Note: if you do not see any choices appear in the drop down, that means that your NCPDP User Account is not linked to any remit and reconciliation codes.)* To avoid any remittance delay, please be sure to deactivate any old reconciliation codes when you add a new one to insure the claims are delivered to the proper location.
3. Enter the effective date of the reconciliation in the **Select Relationship ID Effective Date** box.
4. If you have an electronic copy of the affiliation agreement, click the Browse button and select the file from your computer. If you have a print copy of the affiliation agreement, click the [click here](#) link to print a fax coversheet and fax the affiliation agreement to the toll-free number provided. The agreement will be converted to an electronic file (Adobe pdf) and attached to the pharmacy profile.
5. Click the **Submit** button to submit to pharmacy for verification.

To update an existing relationship, payment center or remit and reconciliation code:

1. Click the **Update** link for the relationship, payment center or remit code you wish to update. For relationships, you can only add a payment center or remit and reconciliation code, if one is not already associated, attach an affiliation agreement if one is not attached and set the relationship as “primary. When adding a Payment Center or Remit and Reconciliation code to an existing relationship on a profile, the current relationship must be termed and a new Relationship Start Date must be entered. The current relationship will be termed one day prior to the new Relationship Start Date. For payment centers and remit and reconciliations you can only update the Start date.

2. If updating a relationship and adding a payment center, click the **Add** button and choose a payment center from the **Select Payment Center** list. The payment center will be “linked” to the relationship, which means they will both have the same effective date and will be updated or deactivated together in the future. *(Note: If you do not see any choices appear in the drop down, that means that your NCPDP User Account is not linked to any payment center codes.)*

To avoid any remittance delay, please be sure to deactivate any old payment centers when you add a new one to insure the payments are delivered to the proper location.

If updating a relationship and adding reconciliation code, click the **Add** button and choose reconciliation from the **Select reconciliation list**. The reconciliation will be “linked” to the relationship, which means they will both have the same effective date and will be updated or deactivated together in the future. *(Note: If you do not see any choices appear in the drop down, that means that your NCPDP User Account is not linked to any remit and reconciliation codes.)*

3. If you have an electronic copy of the affiliation agreement, click the **Browse** button and select the file from your computer. If you have a print copy of the affiliation agreement, click the **click here** link to print a fax coversheet and fax the affiliation agreement to the toll-free number provided. The agreement will be converted to an electronic file (Adobe pdf) and attached to the pharmacy profile.
4. If updating a relationship and this is the primary relationship, click the check box for **Is Primary**. You are allowed to identify one relationship as the primary relationship. A Payment Center and/or Remit and Reconciliation entity cannot be designated as Primary.

5. Click the **Submit** button to submit to NCPDP for verification.

To deactivate a relationship or payment center or remit and reconciliation:

1. Click the **Deactivate** link for the relationship, payment center or remit code

you wish to deactivate.

2. You can choose to simply deactivate a relationship, payment center or remit code, or deactivate and replace with a new relationship, payment center or remit code.

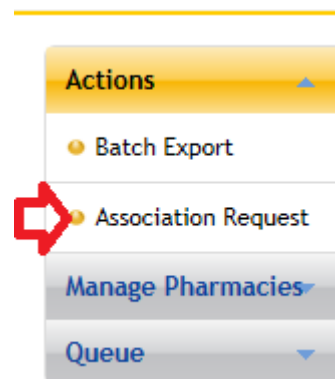
Click the **Deactivate** link associated with the individual relationship, payment center or remit code, or the linked relationship.

If you choose to deactivate and replace a relationship, payment center or remit code with a new relationship payment center or remit code, click the **Deactivate and replace with a new relationship** radio button. Otherwise, click the **Deactivate relationship** radio button.

3. Enter an **Effective Date** for the deactivation.
4. Click the **Submit** button. You will be asked to enter your PIN for verification. If you chose to replace with a new relationship, you will be able to enter the new relationship now exactly the same way you add a new relationship or payment center (see **Add** above).

5.0 Request Access to an NCPDP Provider ID

If you will become or are the primary relationship for a pharmacy and you do not see that pharmacy in your NCPDP Provider ID tab, you can request permission to access and edit the NCPDP Provider ID profile. This is especially important if the pharmacy does not know how to properly associate a relationship or payment center with the NCPDP Provider ID pharmacy profile.



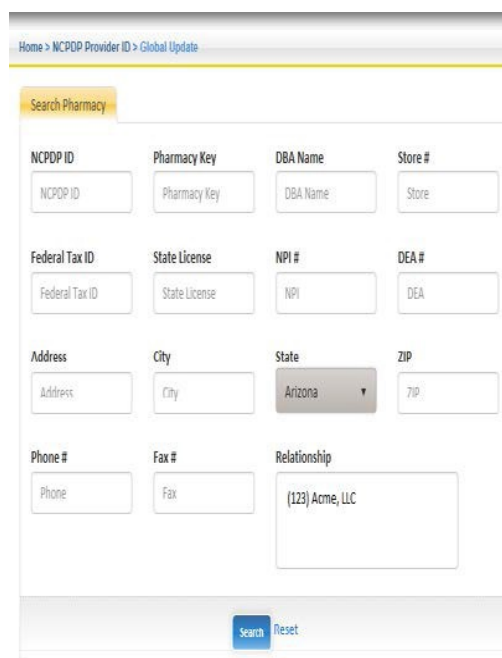
1. Click the **NCPDP Provider ID** tab.
2. Click the **Association Request** link in the **Actions** box.
3. Enter the **NCPDP Provider ID** and attach a copy of the Affiliation Agreement.
4. Click the **Submit** button.

The request to access the pharmacy will be submitted to the pharmacy's Authorized Official for approval. Once approved, you will be able to access and update the pharmacy profile from your organization's list of pharmacies in the **NCPDP Provider ID** tab (see *4.0 Update an Existing NCPDP Provider ID Pharmacy Profile*).

6.0 Create a Batch Export of NCPDP Provider ID Pharmacy Profiles

You can utilize the Batch Export utility to view all data from the NCPDP Provider ID pharmacy profiles, maintained by your organization, in a Microsoft Excel spreadsheet.

1. Click the **NCPDP Provider ID** tab.
2. Click the **Batch Export** link in the **Actions** box.
3. Enter the search criteria for the pharmacies you wish to export. Click the **Search** button to view all pharmacies matching the search criteria. Click the **Reset** link to reset the search criteria.

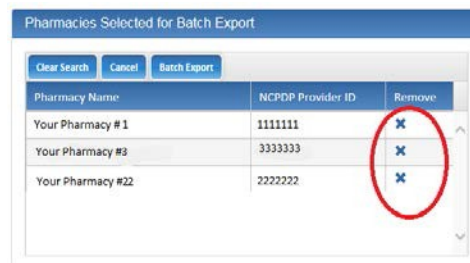


4. Select one or more pharmacies from the search results by clicking the check box next to each pharmacy. If you wish to select ALL pharmacies, click the check box above in the light blue header row of the search results (next to **Pharmacy Name**).

Note: When you select ALL pharmacies you are selecting all pharmacies on this PAGE of the search results. If you wish to increase the number of pharmacies on the page of search results, go to the bottom of the page. By default, 50 pharmacy records are displayed per page. Click the **100**, **300**, or **500** links to increase the number of pharmacy records displayed per page.

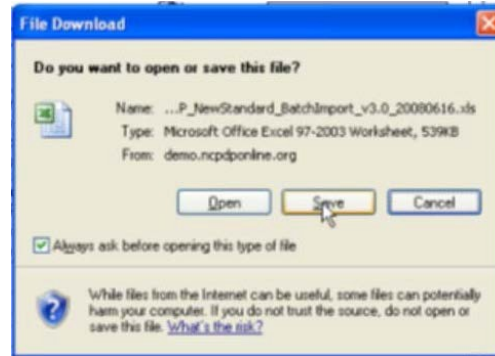
5. Once you have selected the pharmacies, click the **Add to Selected Pharmacies** button. The pharmacies will be added to the **Pharmacies Selected for Batch Export** box.

To remove a pharmacy from the **Pharmacies Selected for Batch Export** box, click the **X** next to the pharmacy name/NCPDP Provider ID. If you wish to remove all pharmacies, click the **Clear Search** button.



Pharmacy Name	NCPDP Provider ID	Remove
Your Pharmacy #1	1111111	X
Your Pharmacy #3	3333333	X
Your Pharmacy #22	2222222	X

6. When all pharmacies have been selected for the batch export, click the **Batch Export** button. A Microsoft Excel file will be generated. You may or may not be asked to Open the file or **Save** the file to your desktop, dependent on your browser.



The Microsoft Excel file provides the following data for each pharmacy:

- Pharmacy Data (pharmacy profile data)
- Additional Dispenser Types
- Additional Medicaid IDs
- Additional Medicare IDs
- Additional Taxonomy Codes
- Services Provided
- Languages Spoken

7.0 Administrative Tools

7.1 Manage Users

A user can have one of four roles in NCPDP Online. User roles are hierarchical, i.e. they build on each other with more responsibilities as you move from **View** to **Admin**.

PSAO View ☑ User can only VIEW pharmacy profiles

PSAO Edit ☑ User can VIEW and EDIT pharmacy profiles, but cannot submit pharmacy profile adds/changes to the pharmacy

PSAO Approver ☑ User can VIEW, EDIT and submit pharmacy profile adds/changes to the pharmacy, as well as approve changes made by other users with the edit permissions

PSAO Admin ☑ User can perform all functions, as well as manage users, relationships, parent organizations and payment centers (see 7.2 through 7.4)

To manage users:

1. Click the **Tools** tab.
2. Click the **Manage Users** link in the **Relationships and Users** box.
3. To create a new user, click the **New User** link in the **Actions** box.
 - If there are any Relationships, Parent Organizations, Payment Centers or remit codes you manage for the pharmacies, and you would like to provide permission for the new user to manage one or more of these. Select one or more by clicking the checkbox next to the Group Key/Relationship in the **Associated Groups** box.
 - Enter the required information (noted with a RED *), which includes First Name, Last Name, Login Name, Password, PIN and Role.
 - Click **Save** to create the new user. If the user is created successfully, you will receive an alert at the top of the page – **User details saved successfully**.
 - Click **Return to Users List** (in the Action box) to verify the new user is now part of your user list.
4. To update an existing user, click the **Update** link associated with the user.

- Make any changes to the existing user information. As with creating a new user, required information (noted with a RED *) must be complete.
 - Click **Save** to save changes. If changes have been saved successfully, you will receive an alert at the top of the page – **User details saved successfully**.
 - Click **Return to Users List** in the Action box at the left.
5. To deactivate an existing user, click the check box next to the user's name, click on the **Deactivate button above the grid**. When prompted "Do you want to deactivate selected user(s)?" click the **OK** button. If you have successfully deactivated a user, you will receive an alert at the top of the page – **User(s) deactivated successfully**. Click the **OK** button.

Deactivated users can be found in the **Inactive Users** queue in the **User Status** box. There are two ways to make the user active again.

1. Check the check box by his or her name and then click the **Activate Selected** button above the grid. When prompted "Do you want to activate selected user(s)?" click the **OK** button. If you have successfully reactivated a user, you will receive an alert at the top of the page – **User(s) activated successfully**. Click the **OK** button. The user will then be active and appear in the **Active Users** queue in the **User Status** box.
2. To make the user active again, simply click the **Edit icon to the right of his/her name**, click the **Is Active** check box, then click **Save**. You will receive an alert at the top of the page – **User(s) activated successfully**. The user will then be active and appear in the **Active Users** queue in the **User Status** box.

7.2 Manage Relationships

You may require one or more relationships for your organization. To manage relationships:

1. Click the **Tools** tab.

2. Click the **Manage Relationships** link in the **Relationships and Users** box.











3. To create a new relationship:

- Click the **Create New Relationship** link in the **Actions** box.
- Enter the required information (noted with a RED *), which includes Group Name, Effective Date, Type and Email address.
- Select the **Type** of relationship from the pick list.
- If a parent organization is associated with this relationship, choose the **Parent Organization** from the pick list.
- Click **Submit** to create the relationship. You will be asked to enter your PIN.
Once NCPDP verifies the new relationship, you will be alerted based on your alert preferences (see 3.4 Change Your Alert Preferences). The relationship will be added to your list of active relationships. You can then associate this relationship with one or more of the NCPDP Provider ID pharmacy profiles (see 4.2 Change of Relationship/Payment Center).

If rejected by NCPDP, you will receive an alert with the reason for the rejection. You can then make the appropriate changes and re-submit.

4. To update an existing relationship:

- Click the **Edit** icon (looks like a pencil) associated with the relationship.

Associate Parent Organization					Search	Q
<input type="checkbox"/>	Relationship Name	Contact Name	Relationship Type Name	Parent Organization Name	Action	
<input type="checkbox"/>	Acme	Account Setup	Third Party Reconciliation Entity		  	
    					10 items per page	1 - 1 of 1 items
 Edit  Deactivate Selected						

- Make any changes to the existing relationship information. As with creating a new relationship, required information (noted with a RED *) must be complete.
- Click **Save** to save changes. Once NCPDP verifies changes to the relationship, you will be alerted based on your alert preferences (see 3.4 *Change Your Alert Preferences*). If rejected by NCPDP, you will receive an alert with the reason for the rejection. You can then make the appropriate changes and re-submit.

5. To deactivate an existing relationship:

- Click the **Deactivate** link associated with the relationship. You will be asked to enter your PIN. You can only deactivate a relationship if NO active NCPDP Provider ID pharmacy profiles are associated with the relationship.



Associate Parent Organization					Search
	Relationship Name	Contact Name	Relationship Type Name	Parent Organization Name	Action
<input type="checkbox"/>	Acme	Account Setup	Third Party Reconciliation Entity		  

10 Items per page 1 - 1 of 1 items

Edit Deactivate Selected

- Once NCPDP verifies the relationship deactivation, you will be alerted based on your alert preferences (see 3.4 *Change Your Alert Preferences*).

7.3 Manage Parent Organizations

If you have more than one relationship, it is recommended that you create a Parent Organization. To manage parent organizations:

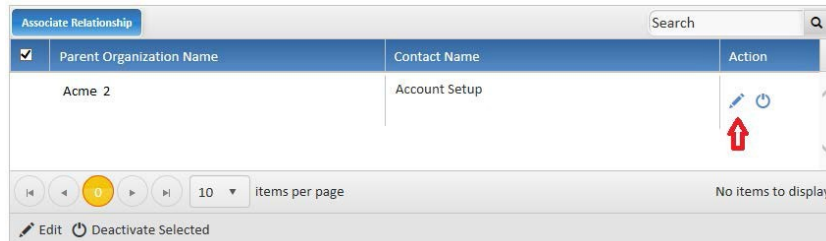
1. Click the **Tools** tab.
2. Click the **Manage Parent Organizations** link in the **Relationships and Users** box.
3. **To create a new parent organization**




- Click the **Create New Parent Org** link in the **Actions** box.
- Enter the required information (noted with a RED *), which includes Group Name and Email address.
- Click **Submit** to create the parent organization. You will be asked to enter your PIN.
- Once NCPDP verifies the new parent organization, you will be alerted based on your alert preferences (see 3.4 *Change Your Alert Preferences*). The parent organization will be added to your list of active parent organizations. You can then associate this parent organization with one or more of your relationships (see 7.2 *Manage Relationships*).

If rejected by NCPDP, you will receive an alert with the reason for the rejection. You can then make the appropriate changes and re-submit.

4. To update your existing parent organizations:

- Click the **Edit icon** link associated with the parent organization.



<input checked="" type="checkbox"/>	Parent Organization Name	Contact Name	Action
	Acme 2	Account Setup	  











10 items per page No items to display

Edit Deactivate Selected

- Make any changes to the existing parent organization information. As with creating a new parent organization, required information (noted with a RED *) must be complete.
- Click **Save** to save changes. Once NCPDP verifies changes to your parent organization, you will be alerted based on your alert preferences (see 3.4 *Change Your Alert Preferences*). If rejected by NCPDP, you will receive an alert with the reason for the rejection. You can then make the appropriate changes and re-submit.

5. To deactivate an existing parent organization:

- Click the **Deactivate** link associated with the parent organization. You will be asked to enter your PIN. You can only deactivate a parent organization if NO active relationships are associated with the parent organization.

Associate Relationship			
Search			
<input checked="" type="checkbox"/>	Parent Organization Name	Contact Name	Action
	Acme 2	Account Setup	  
<div>      </div> <div>10 items per page</div> <div>No items to display</div>			
<div>  Edit  Deactivate Selected </div>			

- Once NCPDP verifies your parent organization deactivation, you will be alerted based on your alert preferences (see 3.4 *Change Your Alert Preferences*).

7.4 Manage Payment Centers

You may require one or more payment centers for your organization. To manage payment centers:

- Click the **Tools** tab.
- Click the **Manage Payment Centers** link in the **Relationships and Users** box.
- To create a new payment center:**
 - Click the **Create New Payment Center** link in the **Actions** box.
 - Enter the required information (noted with a RED *), which includes Group Name, Effective Date and Email address. Because this is a payment center (versus a relationship), it is important that you enter the address and Authorized Official information.
 - Click **Submit** to create the new payment center. You will be asked to enter your PIN.
 - Once NCPDP verifies new payment center, you will be alerted based on your alert preferences (see 3.4 *Change Your Alert*

Preferences). The payment center will be added to your list of active payment centers. You can then associate this payment center with one or more of your NCPDP Provider ID pharmacy profiles (see 4.2 *Change of Relationship/Payment Center*).

If rejected by NCPDP, you will receive an alert with the reason for the rejection. You can then make the appropriate changes and re-submit.

4. To update your existing payment centers:

- Click the **Edit icon** (looks like a pencil) associated with the payment center.














- Make any changes to the existing payment center information. As with creating a new payment center, required information (noted with a RED *) must be complete.
- Click **Save** to save changes. Once NCPDP verifies changes to your payment center, you will be alerted based on your alert preferences (see 3.4 *Change Your Alert Preferences*). If rejected by NCPDP, you will receive an alert with the reason for the rejection. You can then make the appropriate changes and re-submit.

5. To deactivate an existing payment center:

- Click the **Deactivate** link associated with the payment center. You will be asked to enter your PIN. You can only deactivate a payment center if NO active NCPDP Provider ID pharmacy

profiles are associated with the payment center.

Search			
<input type="checkbox"/>	Payment Center Name	Contact Name	Action
<input type="checkbox"/>	Acme 3	Joe Contact	  
<div>      </div> <div>10 Items per page</div> <div>1 - 1 of 1 Items</div>			
<div>  Edit  Deactivate  Selected </div>			

- Once NCPDP verifies your payment center deactivation, you will be alerted based on your alert preferences (see 3.4 *Change Your Alert Preferences*).

7.5 Manage Remit and Reconciliation Codes

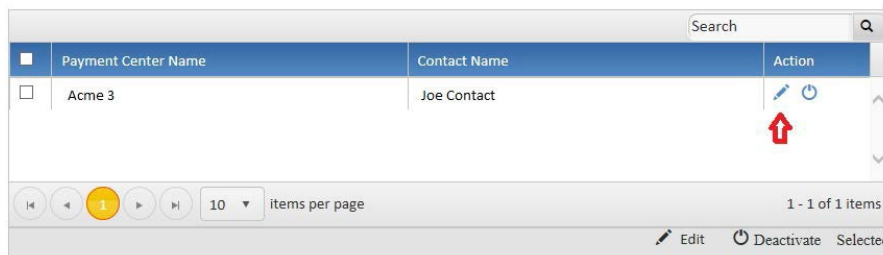
You may require one or more remit and reconciliation codes for your organization. To manage remit and reconciliation codes:



- Click the **Tools** tab.
- Click the **Manage Remit and Reconciliation** link in the **Relationships and Users** box.
- To create a new remit and reconciliation:
 - Click the **Create New Reconciliation** link in the **Actions** box.
 - Enter the required information (noted with a RED *), which includes Group Name, Effective Date and Email address. Because this is a remit and reconciliation (versus a relationship), it is important that you enter the address and Authorized Official information.
 - Click **Submit** to create the new remit and reconciliation code. You will be asked to enter your PIN.
 - Once NCPDP verifies new remit code, you will be alerted based on your alert preferences (see 3.4 *Change Your Alert Preferences*). The remit code will be added to your list of active remit and reconciliations. You can then associate this remit code with one or more of your NCPDP Provider ID pharmacy profiles (see 4.2 *Change of Relationship/Payment Center/Remit and Reconciliation code*).

If rejected by NCPDP, you will receive an alert with the reason for the rejection. You can then make the appropriate changes and re-submit.

4. To update your existing remit and reconciliation codes:

- Click the **Edit icon** (looks like a pencil) associated with the payment center.



	Payment Center Name	Contact Name	Action
<input type="checkbox"/>	Acme 3	Joe Contact	 

1 - 1 of 1 items

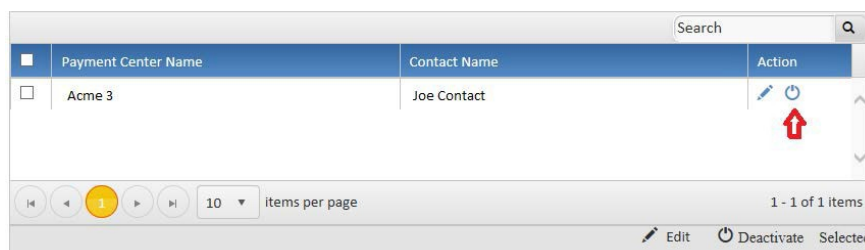
10 items per page



Edit Deactivate Selected

- Make any changes to the existing remit and reconciliation information. As with creating a new remit and reconciliation, required information (noted with a RED *) must be complete.
- Click **Save** to save changes. Once NCPDP verifies changes to your remit and reconciliation, you will be alerted based on your alert preferences (see 3.4 *Change Your Alert Preferences*). If rejected by NCPDP, you will receive an alert with the reason for the rejection. You can then make the appropriate changes and re-submit.

5. To deactivate an existing remit and reconciliation code:

- Click the **Deactivate** link associated with the remit and reconciliation. You will be asked to enter your PIN. You can only deactivate a remit and reconciliation if NO active NCPDP Provider ID pharmacy profiles are associated with the remit and reconciliation.



	Payment Center Name	Contact Name	Action
<input type="checkbox"/>	Acme 3	Joe Contact	 

1 - 1 of 1 items

10 items per page

Edit Deactivate Selected

- Once NCPDP verifies your payment center deactivation, you will be alerted based on your alert preferences (see 3.4 *Change Your Alert Preferences*).